

BRITISH WOODWORKING FEDERATION

# 2021 HOME IMPROVEMENT INDEX

Identifying home renovation market  
opportunities for the woodworking  
and joinery sector





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# Foreword

**March 2021**

The COVID-19 pandemic has affected people's lives in numerous ways. The majority of us have found ourselves forced to spend far more time at home than we are used to and, as such, have re-evaluated the space we are living in and what we desire from a home. In the same way, we have all had to be flexible in the last 12 months; our homes have had to become offices, schools, gyms and more. For many, as we will discover, this has meant turning to renovation to create ideal living environments.

As the trade body for the woodworking and joinery sector, the British Woodworking Federation knows how vitally important the home renovation market is for our members, and the skilled people you employ right across the UK. While we know from external data that there has been a rise in the number of people re-mortgaging and taking out personal loans during the pandemic, which is potentially encouraging news for our sector, this does not offer insight into the specific intentions of homeowners to renovate or invest in their homes.

The **Home Improvement Index** from the British Woodworking Federation offers a unique insight into the plans, motivations, and inspirations behind anticipated home renovation activity in the coming 12 months. This index is based on a wide-ranging attitudinal survey of 3,000 UK homeowners and seeks to uncover the scale of the opportunity, the reasons behind making changes to homes and the intention to use tradespeople and products – helping to inform our sector's approach to the home renovation market in the coming year.

I am very happy to announce that based on this research, the outlook for our sector is hugely positive. Over half of respondents – which we can take as a representative sample of all UK homeowners – are either definitely planning renovation work in the next 12 months or are strongly considering it. All of these projects will go far beyond mere DIY and will require tradespeople, and the vast majority involve products and services offered by our membership.

The home renovation market is, of course, a hugely competitive space where the widest ever choice of building products means that, as a sector, we must inspire homeowners as to what can be achieved by using timber. But I'm hugely confident that with the passion and drive that I know our members possess, and with the support of the British Woodworking Federation as your trade organisation, we will make a huge success of the opportunity, and see timber used to create amazing home spaces.

Thank you for reading this report.

**Helen Hewitt, Chief Executive,**  
British Woodworking Federation



# 2021: a major home renovation opportunity

Lockdown has provided the natural opportunity for homeowners to take a step back and reassess their living space. Over a quarter of respondents (all of which are UK homeowners) stated that they definitely plan to renovate their homes in the next 12 months. A larger proportion, 30%, are considering renovation in the same period. If we take these figures as representative, this means that the potential home renovation market in the UK equates to over half of the UK's entire 14.6 million homeowner households<sup>1</sup>.

As well as this great opportunity for substantial renovations, 86% of homeowners are planning smaller cosmetic changes to their homes including decoration, new fittings, furniture and bespoke joinery products.

People's reasons for choosing to renovate are many and varied. However, the vast majority are improving the homes they live in for comfort and not in preparation to market the property. This is an important distinction to be aware of; while it won't necessarily have a bearing upon material choice, it does reveal that choices will be deeply personal to individuals, and not simply based on bringing a property up to an acceptable condition for sale.

## Timings

We have come to expect seasonal variation in home renovation activity, but data suggests that homeowners' plan in the coming year is to undertake work as soon as possible.

Over half of all planned projects will have begun by the summer of 2021, and the majority of projects

(73%) started by September. This is positive news for our sector as it means homeowners will be considering materials and services imminently. We have the opportunity to respond to this demand and be in a position to communicate key messages through strong sales and marketing activity that reinforces the benefits of timber.

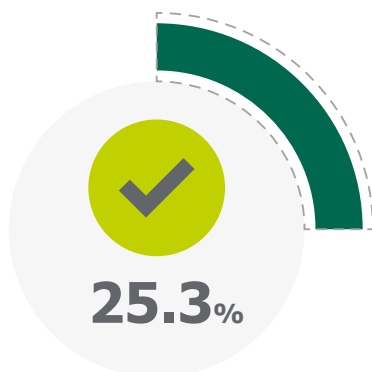
## Budgets

Respondents have indicated that budgets for renovation work in the next 12 months are likely to be considerable – far beyond those required for simple cosmetic changes or DIY. Those homeowners who are planning or considering renovations have allocated nearly £27,000 on average, to improvements this year. Beyond this, 15% are planning to spend over £50,000 and 7% have indicated they will be investing over £80,000.

This report will go on to explore exactly where budgets are intended to be spent, but we can clearly see that there is substantial potential for the products and services our members offer to feature within plans.

<sup>1</sup> Source: UK Government home ownership figures 2020: <https://www.ethnicity-facts-figures.service.gov.uk/housing/owning-and-renting/home-ownership/latest>

## Home renovations plans

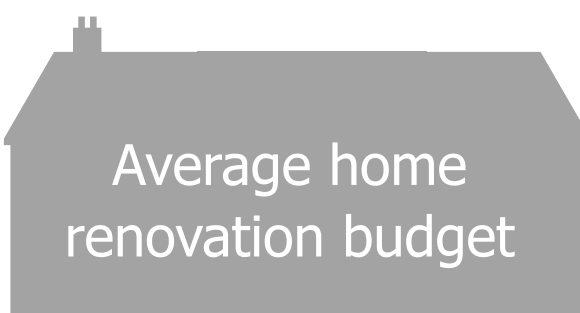
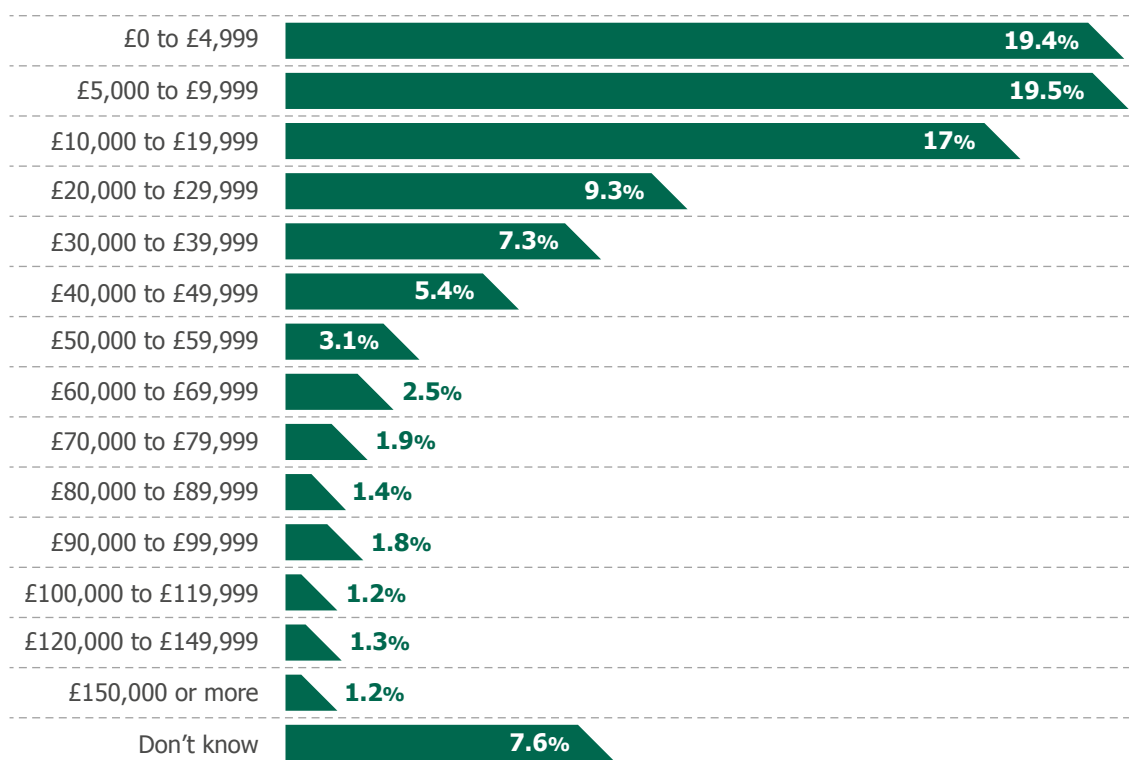


Definitely going to carry out this type of work, at some time during the next 12 months



I'm considering this type of work, at some time during the next 12 months

## Intended home renovation budgets





# Location, location, location?

According to Bank of England data, the stamp duty holiday – extended in the Spring Budget until the summer of 2021 – has driven the number of house sales to reach levels not seen since 2007. While housing market activity varies from one region to another, this report is informed by a comprehensive pan-UK survey, meaning we can offer an overall view of national intent for the first time.

Broadly, it's a very positive outlook right across the UK, with intent not dropping below 40% (definitely planning or considering renovation) for any region. Furthermore, in some areas, this intent reaches as high as 60%.

This means that product manufacturers and joinery firms – whether large or small, UK-wide or fixed to a single location – can all benefit from the home renovation opportunity presented this year.

So strong is the national appetite to renovate, that while urban areas show slightly higher levels of intent than rural areas, over half of countryside and village homeowners still plan to carry out works this year. Similarly, there was no significant variation in plans among owners of different home types, other than, as perhaps expected, flat owners are less likely to renovate.

The potential is vast; but what might these projects look like?

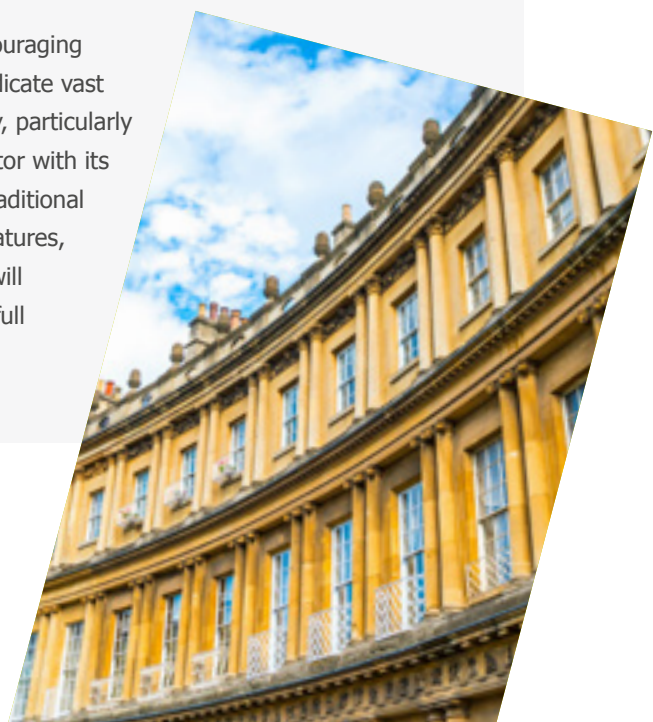
## Investment in heritage

Clearly the enthusiasm for renovation is universal, but one area in particular stands out: heritage property. Owners of heritage properties, period homes or homes in conservation areas are more than twice as likely to undertake renovation in the next 12 months than those living in more modern properties. Almost half (49%) of heritage property owners definitely planned renovation in the next 12 months, and over a third (34%) were considering it.

Not only is there likely to be greater levels of renovation activity in these property types, budgets are expected to be more than double those for non-heritage homes, with

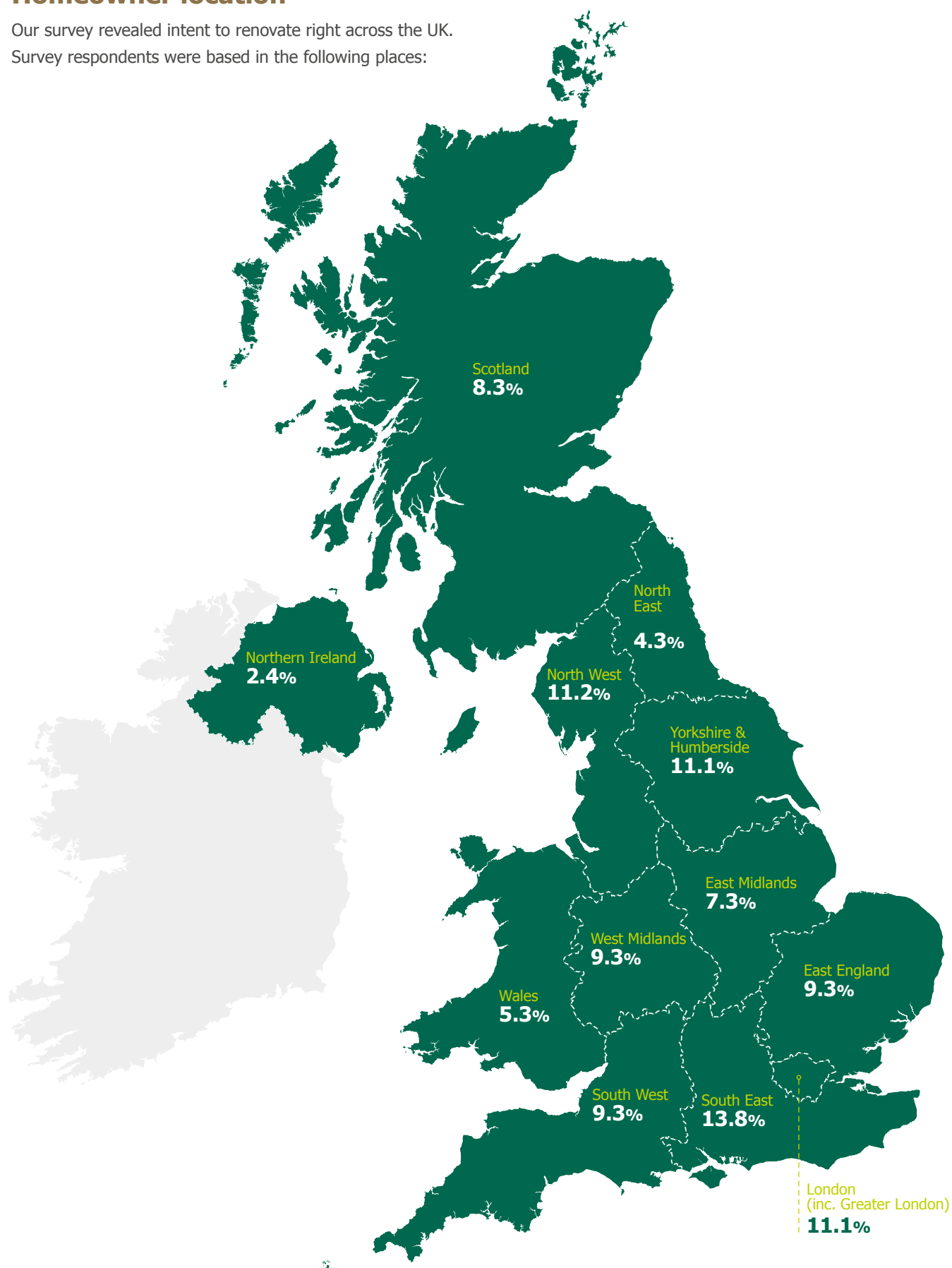
an average spend of £46,000 compared to the overall average budget of £26,000.

These encouraging findings indicate vast opportunity, particularly for our sector with its focus on traditional wooden features, which we will explore in full later in this report.



## Homeowner location

Our survey revealed intent to renovate right across the UK.  
Survey respondents were based in the following places:



## The opportunity for the timber industry

# Renovation projects in focus

We know that home improvement projects are going to be happening up and down the country, and how significant they are likely to be. Here we examine the specific nature of those projects, enabling our members to identify where the opportunities are likely to lie for their own individual products and services. In this section, before we examine intention to use timber products and joinery services, we look at the overall types of work those planning to renovate are seeking to carry out.

### The remote working revolution

Adapting our living space for work has been a defining feature of the pandemic. Separate studies show that remote working looks set to be a part of our working lives, in some capacity, on a more permanent basis. The Royal Society for Public Health reported that three quarters of the nation expect to continue working from home at least a few days a week once COVID-19 restrictions are eased.

And it seems that the desire to create more permanent workspaces in the home is influencing the overall renovation plans of homeowners. Our data shows that 10% of renovators are planning to create an indoor working space, and the same proportion, more interestingly, are investing in an outdoor workspace in the form of converting outbuildings or building bespoke garden-based workspace buildings.

People see the need to adapt their homes for a more permanent remote working arrangement, and they are willing to invest in doing so. For those members offering interior and bespoke joinery, the work-from-home revolution could translate into greater appetite for new types of renovation work.

### Interior work

Data reveals a broad spectrum of intent across both indoor and outdoor projects, and largely that work will comprise major structural projects, refits or large-scale installations. Looking at indoor work initially – where our members will see the greatest overall benefit:

- In terms of major structural work, there is a clear desire for property extensions (14% of renovators), loft conversions (12%) and basement conversions (5%). These projects will, of course, largely require key elements provided by our membership including new windows, staircases, and joinery work.
- When it comes to major installations, over a quarter (29%) of renovators are planning to fit new kitchens, providing potential opportunity for those members that manufacture or install timber kitchens, as well as for bespoke joinery. In addition, 9% either plan to install conservatories or have existing ones replaced.
- Looking specifically at decisions to use certain types of products, again we see a distinct opportunity for our membership. Almost a quarter of renovations will require windows to be replaced – some of which will be part of the major structural work already outlined. Interior doors will be required by 20% of all home renovators, and new staircases by 10% – revealing demand right across the spectrum of products offered by our membership.



- In terms of specific services homeowners will require, it's encouraging to see that just under a fifth (19%) are seeking substantial bespoke joinery work including built in units or shelves. We know that the joinery services offered by our membership are broad – ranging from bespoke carving, porches, mouldings and architraves, heritage joinery, panelling and more – and the outlook for these types of services appears bright.

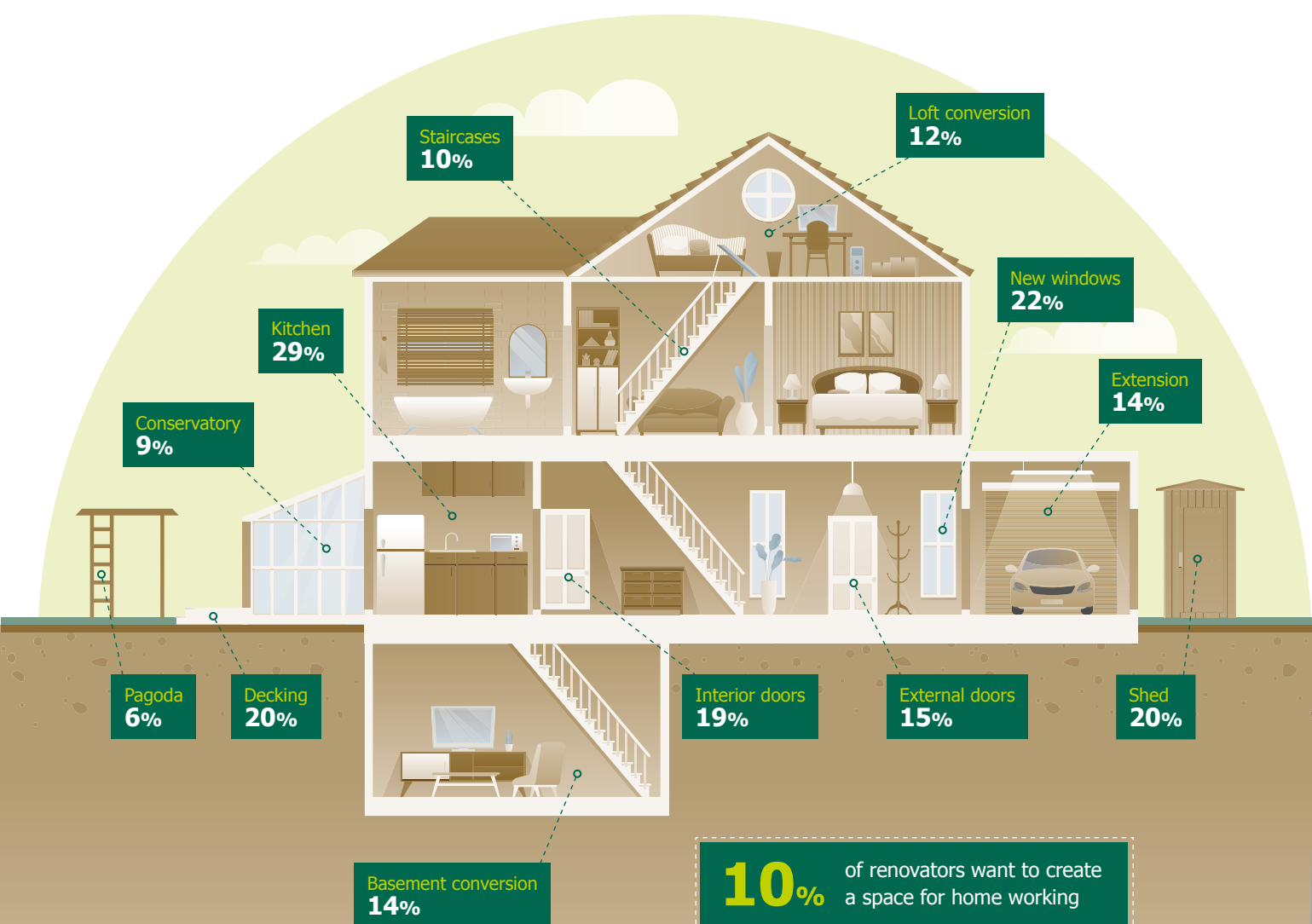
### Exterior work

With summer 2021 looking set to be the first period of reduced social restrictions since early 2020, there is

also a commitment among homeowners to undertake outdoor work. While we see from the data that the majority of the appetite is for major structural and landscaping work, a fifth (20%) are planning to simply install decking in their garden. The same proportion (20%) want to have a new shed in their garden, and 6% a garden pagoda.

We have explored the broader work types that form part of renovation plans, and the potential opportunity this presents our members with. But to what extent are people considering timber products and joinery services?

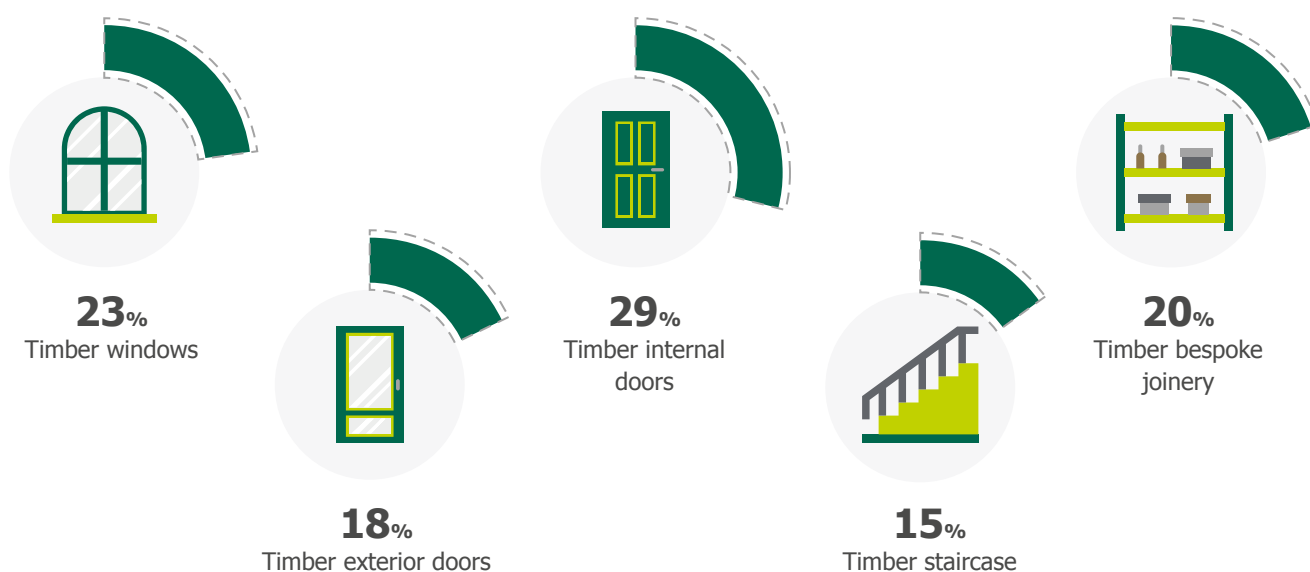
## Homeowner renovation plans



# The appetite for timber

Data suggests there is a major opportunity for timber products and joinery services. When asked about intentions to use timber or joinery services as part of renovation plans, over 70% of renovators responded positively – from windows, doors and staircases to bespoke joinery, built-in units and furniture – the desire is there.

## How many renovators will choose timber?



### Windows and doors

Where wood windows are concerned, the outlook is positive for members in terms of intention to use timber. Of the quarter of homeowners who plan to replace windows, 23% are currently intending to do so using timber windows – greater than the proportion of people who say they already have wood windows in their home (17%). This could indicate that wood windows will form part of newly renovated areas of the home to complement other window types in other areas, or that people plan to replace PVCu or aluminium windows with

timber. This presents a clear opportunity for members to engage with homeowners and educate them on the benefits of timber windows to maximise the potential of this growth opportunity.

When it comes to doors, as a proportion of all those planning renovations, 30% are seeking timber internal doors and 19% timber external doors. We've already seen that a substantial proportion of those renovating are intending major structural work and reconfiguration where doors – interior and external – will be required.

### Stairway to success

For 15% of homeowners intending to renovate, new staircases will be required. As we've already identified, loft conversions feature in plans for 11% of renovators, which is likely to be driving the bulk of demand for staircases, however this doesn't account for all of the interest.

When we look at the influencing factors behind stairway choice, it's perhaps no surprise to learn that the aesthetic and cost of a staircase are most important to homeowners. But with safety placing third in the list of overall priorities, there is a clear need to educate homeowners on the importance of safety in staircase design.

### Bespoke joinery

Promisingly, there is strong recognition that a specialist joiner or woodworker is required for a large proportion of projects, as opposed to reliance on more generalist professionals.

When asked specifically about the skills required to support renovations, over a third of people say they will require joinery services. Considering only a slightly higher proportion (38%) say they will require builders, we can see just how prominently wood is expected to feature in renovation projects.

For our membership this could open up opportunities for a range of bespoke joinery services including storage and shelving, larger features such as porches, or bespoke furniture.

It is encouraging to see that there is an understanding of the value that those with specialist expertise and experience bring to a project.

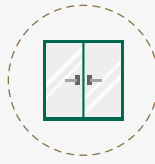
## Exterior doors in focus

When it comes to exterior doors - particularly for extensions or when reconfiguring a home - renovators have a large choice, and our data shows there is intent to purchase across the spectrum of products available. The figures below reveal the current intent among those planning renovation to include certain types of exterior door. It us down to our sector to demonstrate why timber should be the material of choice for these products.



**8%**

Bi-fold doors



**7%**

French doors



**8.5%**

Sliding doors

# Products for heritage properties

We know that decisions made by homeowners planning renovation are mainly deeply personal, as opposed to driven by plans to sell a home. For owners of period properties there is also a sense of responsibility to maintain their building in line with its history.

As we have explored, heritage property owners are more than twice as likely to undertake renovation work in the next 12 months than all other homeowners, and budgets are more than double those for the average project. But what does this mean for use of timber products and joinery services?

Owners of heritage or period homes are more than three times as likely to select timber windows than those living in other property types. Over half of heritage property owners state that they replace windows less than every 15 years, meaning there is an opportunity to educate homeowners over the longevity of wood windows and the maintenance required to ensure their lifespan is maximised.

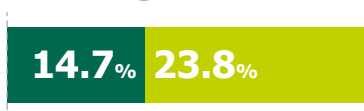
There was also a far greater likeliness for new staircases to feature in renovation plans for owners of

heritage or period properties. Almost a quarter (24%) of these property owners planning renovation were considering a timber staircase, compared to 12% for non-heritage homes.

The timber and joinery market for heritage properties is one that we expect to be strong. With nearly half a million heritage properties being listed and subject to planning restrictions and covenants, when homeowners find a reliable source for their home maintenance, as we will explore further, they are likely to return in the future.

Therefore, there is not only immediate potential for our sector when it comes to heritage properties, but an opportunity to develop longer-term customer relationships based on high quality products and workmanship.

## Heritage



- Planning timber windows
- Planning timber staircase

## Non-heritage



- Planning timber windows
- Planning timber staircase

# 54%

of heritage property owners replace windows less than every 15 years

## Where are heritage properties located?



**28.4%**

Rural in the countryside (which could include a small town in the countryside)

**53.4%**

Suburban on the outskirts or suburbs of a large town or city

**18.2%**

Urban within a large town or city

## Heritage vs non-heritage



**49%**

Those living in heritage property or within conservation area definitely carrying out substantial renovations

**29%**

Those living in non-heritage property definitely carrying out renovations



**£46<sub>k</sub>**

average renovation budget for heritage properties

**£19<sub>k</sub>**

average renovation budget for non-heritage properties





# Decisions, decisions – what is driving the choices made?

We have explored the appetite for timber products and joinery services as part of overall renovation plans, and looked at where the major opportunities lie for our sector. We know there are substantial budgets behind plans for the next 12 months, and it's also clear that education will be required to tackle some of the common misconceptions or misunderstandings over timber products.

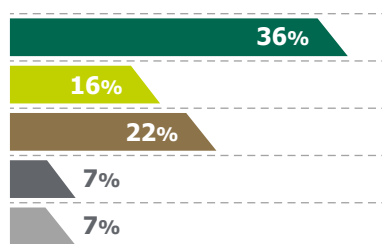
## Which wood?

When asked their preferred choice of timber for stairs, doors or windows, homeowners largely selected hardwood – namely oak or beech. Typically, engineered or modified woods were less desired, even when it came to wood windows, with 22% opting for engineered wood compared to 36% for hardwood.

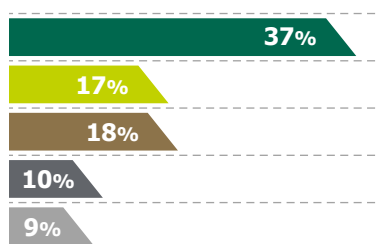
The largest demand for softwoods such as pine or cedar is likely to come from those requiring internal doors, with 22% choosing it as their preference, compared to 18% for built-in units or shelving, and 17% for stairs. While it's encouraging to see a desire for wood products of all kinds, this data reveals an opportunity for our sector to educate homeowners on the benefits of various wood types, and their suitability for certain functions.



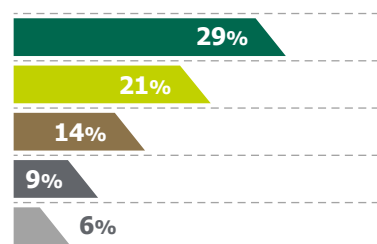
### Window



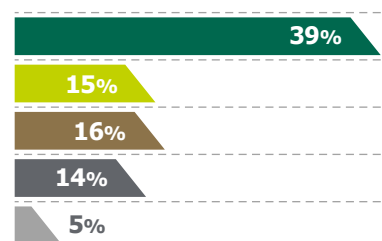
### Stairs



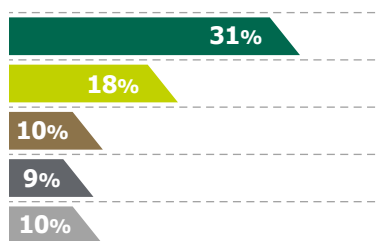
### Internal doors



### Exterior doors



### Shelving/units



## Key

- Hardwood
- Softwood
- Engineered wood
- Recycled wood
- Leave to a tradesperson

The British Woodworking Federation's research also sought to identify what the key influences were over homeowners' decisions on products and services, to provide you as members with the insight that could inform how you communicate your offering to customers.

### Cost

Unsurprisingly, for more than 80% of homeowners the cost of purchase and installation is a primary driver for decisions. It is notable that despite sizeable budgets having been allocated to this year's planned work, the UK's renovators remain cost conscious and want to achieve a lot for their investments, whatever the size. It's important that value is emphasised over direct costs, and this is where product lifespan – which is explored separately – is an important benefit.

### Aesthetics

Almost equally as important is the look and feel of the product chosen. With consumers now enjoying the largest

ever choice of products to choose from – including innovative non-timber materials – it's vital we're able to inspire homeowners with the effect wood can create in the home, and highlight the versatility of timber products.

Results also show that homeowners are prepared, to some extent, to sacrifice aesthetic for lower cost, especially where they may be trying to achieve a number of things for a set budget.

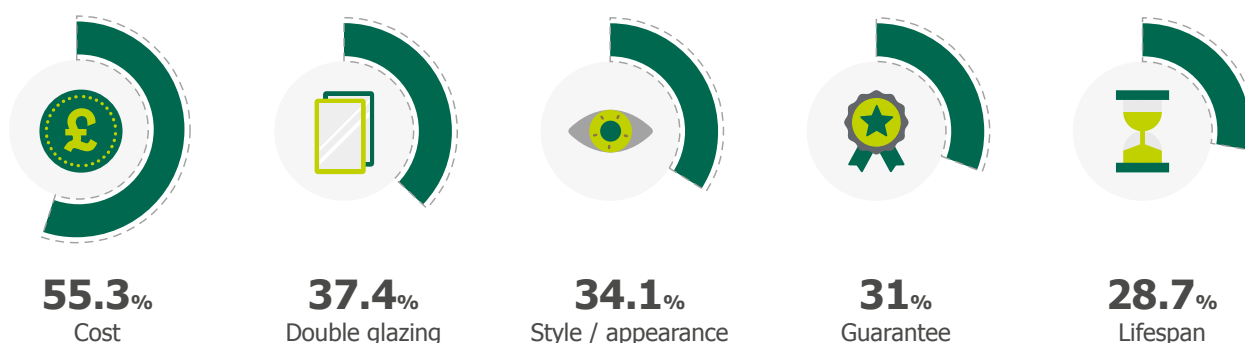
### Ease of maintenance

80% of those planning renovations are mindful of ensuring the products they choose for their home are low maintenance, in terms of being easy to clean or repair. We know that misconceptions exist over the ease of maintenance for wood products, particularly windows. However, this again represents an opportunity to educate customers who may not be aware, for example, of the latest guarantees available over product performance, or exactly how wood products can be maintained efficiently to boost lifespan.

## Top 5 drivers for staircase selection



## Top 5 factors influencing window selection



<sup>2</sup> Historic England: <https://historicengland.org.uk/listing/what-is-designation/listed-buildings/#:~:text=Surprisingly%20the%20total%20number%20of,listed%20buildings%20on%20the%20NHLE.>

### Competence and credibility

Whether homeowners are choosing a supplier of timber products, installers for products, or joiners to carry out bespoke work in the home, formal industry accreditation will be a major driver behind choices made.

When selecting a window supplier, the proven competence of the installers, demonstrated by certification from organisations such as FENSA or Certass, company accreditation and trade association memberships, emerged as most important. Homeowners are overwhelmingly seeking assurance that tradespeople are competent, audited, and accredited. The British

Woodworking Federation membership, and other affiliations, are therefore important to feature prominently in interactions with customers.

### Product lifespan

Part of addressing the nation's cost consciousness is to emphasise the whole life cost of timber, and its likelihood to outperform alternatives. Heriot-Watt University carried out respected research into the ownership cost of windows comparing timber, modified timber, aluminium-clad timber, and PVCu frames, and revealed that timber was found to have the lowest whole life cost over 60 years – messaging that can be adopted when educating customers.

## Word of mouth recommendations

A recommendation from friends or family is overwhelmingly the biggest influence when it comes to choosing products or services.

When looking to appoint a joiner or woodworker, 45% of people are steered by good reviews by friends or family, and 34% opt for tradespeople they have used previously themselves.

For window choices, 39% of people stated they would make a decision based on a recommendation. This suggests two important points to note for our members when it comes to maximising the home renovation opportunity.

- Marketing to previous clients could be a worthwhile investment in your sales pipeline. We know that demand for services is strong, and this provides an opportunity to remain front-of-mind over any decision over products or tradespeople.
- The British Woodworking Federation's Code of Conduct, which all of our members are audited to, outlines a rigorous set of standards for them to adhere to, and we are fully committed to helping all members meet what is required.

Visit our website for a selection of guides and policies that you can adapt and adopt to help your business comply: [www.bwf.org.uk](http://www.bwf.org.uk).

## Green credentials

Consumers are increasingly interested in establishing the sustainability of the products they are buying and indeed the green credentials of the companies they are engaging with. Those people planning home improvements this year are no exception.

While the environmental impact of products is less of a consideration than cost, durability, and aesthetics, according to our data, for 60% of people it is important to know that products have been sourced and manufactured in an environmentally friendly way.

When it comes to wood products specifically, a third of respondents said that the next time they purchase timber furniture or features for their home they will look for certification of sustainability from organisations such

as the Forest Stewardship Council (FSC) or Programme for the Endorsement of Forest Certification (PEFC).

Although wood is a very low-carbon building material when compared to other products, we are aware there is a widespread lack of understanding over its environmental impact. Terms such as whole-life carbon and embodied carbon – while important for our sector's messaging over timber – are not generally well understood, and require caution over how they are used to explain green credentials.

Ultimately, homeowners are conscientious over their buying decisions, and being clear over membership to any chain of custody schemes will help demonstrate the timber has been sourced and procured correctly.

**When choosing a woodworker or joiner, a number of factors influence homeowners' decisions. For almost a third of renovators, certifications and installer competence are major factors, especially when it comes to choices over timber window installation. It's important to always highlight certifications and trade association membership to give consumers confidence.**



## What does this mean for you?

# Maximising the home renovation opportunity

This report has explored the desire to renovate and the motivations behind major choices. But what does the data tell us about the scale of the opportunity in the coming 12 months and how, as a sector, we can maximise it?

One of the consistent findings within the report is that knowledge gaps exist over wood products and their benefits, presenting opportunities to educate and inspire homeowners over their choices and enable them to make more informed decisions.

### Addressing misconceptions

The data confirms that cost, product lifespan and ease of maintenance are key concerns for renovators, meaning these areas are vital to address in messaging over products and services offered.

As a sector we have a detailed knowledge of the benefits of timber when compared to other materials, but customers largely don't. Misconceptions are still common, and we must confidently counter these assumptions by highlighting where timber offers an advantage.

For example, when it comes to wooden windows, each key concern can be addressed in turn:

- **Good value** The durability of wood window frames means that they have a long service life and can work out less expensive over their lifetime compared to alternatives. Engineered and modified timbers offer excellent lifetime performance and extend the choice of material available.
- **Aesthetic finish** The huge variety of wood window frame designs available means that they look great whether in a period or modern home. Wood window frames are highly versatile be easily repainted, so the look of a home can be cost effectively transformed to meet the homeowner's preference throughout the window's lifespan.
- **Ease of maintenance** Modern window frames require far less maintenance than is often thought to be the case. Many British Woodworking Federation members offer guarantees of up to 10 years for paint coated products and seven years for wood-stained products.

**Each product, of course, has its own specific benefits, but broadly there is a very strong case for timber products of all kinds to meet key homeowner priorities over value, aesthetic, and maintenance.**



### **How do we position timber products and joinery services?**

To capitalise on the UK's renovation ambitions, it is important to consider the following three strands of insight when shaping messaging and approach:

#### **Why?**

- Homeowners are renovating to enjoy the homes they live in, rather than with intent to move. The choices they make are personal, and may take some time to arrive at. Wide variety will appeal but homeowners need to know the difference between options, and how they can rule out certain products if they're not appropriate to meet the need.

#### **Who?**

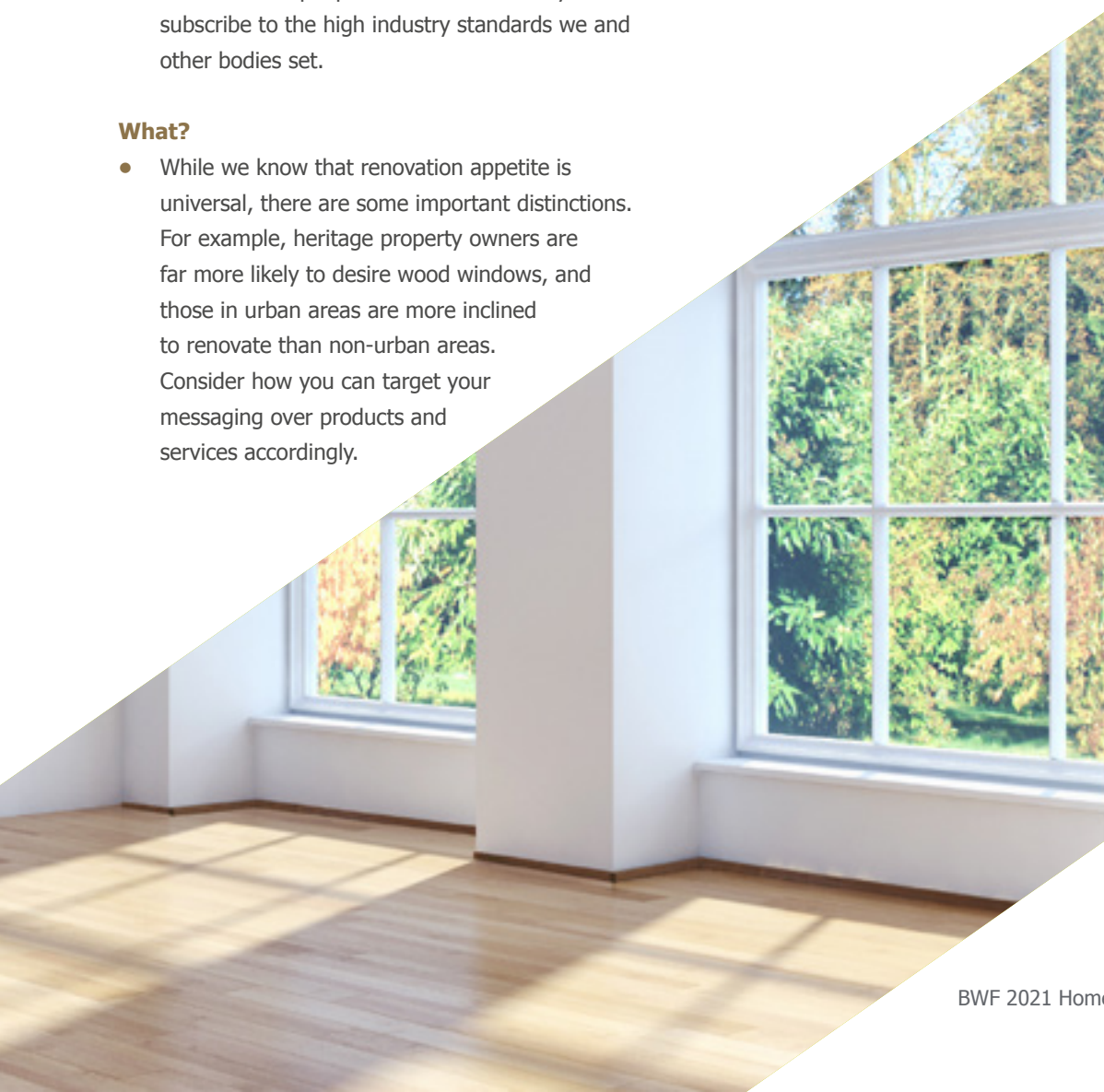
- The adage of people buying from people remains true. Quality service as well as the end result is what will ensure customers want to tell others about a company. It is here that your British Woodworking Federation membership can come into its own – people want to know that you subscribe to the high industry standards we and other bodies set.

#### **What?**

- While we know that renovation appetite is universal, there are some important distinctions. For example, heritage property owners are far more likely to desire wood windows, and those in urban areas are more inclined to renovate than non-urban areas. Consider how you can target your messaging over products and services accordingly.

While the coming 12 months will continue to be uncertain for many, the signs are that there is positive intent to utilise the skills, experience and products produced by our sector as part of wider renovation plans. With the stamp duty holiday extended to the summer of 2022 as part of the Spring Budget, renovation activity may be stimulated further – either due to a desire to improve a home in order to market it, or to renovate a newly-purchased home.

As a sector we can feel empowered to make a strong case for timber. The British Woodworking Federation will continue to support you and your business with appropriate resources and practical guidance throughout – we are looking forward to seeing what we can achieve together.



This report comprising creative work, proprietary research and strategic thinking ('Confidential Information') is presented on the basis that it will be treated as confidential by the recipient, unless appropriately attributed to the British Woodworking Federation (BWF). The data in this report was obtained from an online survey of 3,000 homeowners from across the UK, commissioned by the British Woodworking Federation. Data was gathered between February and March 2021.